pERT | PUBLIC EMPLOYER READINESS TEAM »

PERT – Data Structures for File Reporters Retirement & Health

September 2010

Logistics

» CalPERS_PERT4U@calpers.ca.gov

» Chat

» Audio

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Agenda

Terms & Notation

Technical Toolkit

Retirement/Health Data Elements

Retirement/Health Schema Overview

Retirement/Health Reporting Scenarios

Polling Questions

Wrap Up

Q & A

Terms & Notation

» Node = a branch structure containing 1 or more nodes or elements

» ….. = designates additional nodes or elements branching from noted element

Technical Toolkit

CalPERS On-Line

www.calpers.ca.gov/pert

» Employers

www.calpers.ca.gov/mycalperspartners

» Direct Authorization Vendors

Technical Toolkit

Contents
- » Quick Reference Guide
- » Content Changes
- » Guide to the Technical Toolkit
- » Guide to File Readiness
- » Data Element Definitions
- » Schemas
- » CalPERS ID File Exchange Layout
- » Encryption/Decryption External File Naming
- » Sample XML
- » XML Validator Tool Setup & Usage Guide
- » XML Validator Tool
- » Tools Available on the Internet

Retirement & Health Data Elements

» CalPERS ID

   » Always 10 digits

» Decimal

   » 40.00 vs 0040.00

   » 40 allowed

» Boolean

   » "true" vs "True"

Retirement/Health Data Elements

Member

» Participant

Subscriber

» Primary account holder for health

Qualifying Individual

» Member who qualifies subscriber for health

Retirement/Health Data Elements

CalPERS IDs

» Employer's

» Person

» Qualifying Person

» Dependent

Retirement/Health Schema Overview

Retirement Health Enrollment	Transaction
Enrollment Acknowledgment	Status (response only)
Person Info….	
Dependent Person Info….	
Communication Info….	
Employer Info….	
Employment Info….	
Job Position Info	
Subscriber Info….	

Retirement/Health Schema Overview

Dependent Info….	
Person Info….	
Dependent Person Info….	
Address Info….	
Transaction Type….	….
	Demographics….
	Appointment….
	Retirement Enrollment….
	Health Enrollment….
	Error….

Retirement/Health Schema Overview

Person Info / Dependent Person Info / Qualifying Person Info	Person ID	SSN
		CalPERS ID
	Person ID Type	
	Prefix	
	First Name	
	Middle Name	
	Last Name	
	Suffix	
	Birth Date	
	Gender	

Retirement/Health Schema Overview

Communication Info	Phone	Phone Type
		US Phone
		International Phone
		Extension
	Email	
Employer Info	Employer CalPERS ID	
	Agency code (State only)	
	County (Retirement - JRS only)	

Retirement/Health Schema Overview

Employment Info	Original Hire Date
	Leave of Absence Type
	Perm Sep Reason
	Temp Appt (state retirement only)
	Temp Appt Sep Date (state retirement only)
	Work Calendar
	CBU
	Exempt Authority (state retirement only)
	Retired Annuitant

Note: All data elements on this slide are specific to retirement enrollment only

Retirement/Health Schema Overview

Job Position Info	Position code (retirement only)
	Appointment ID
	Retirement system (non-state health only)
	Member Category (retirement only)
	Tier (state retirement only)
	Court Level (retirement only)
	Assignment Type (retirement only)

Retirement/Health Schema Overview

Subscriber Info	Apply Change to Medical Plan
	Apply Change to Dental Plan (future use – state)
	Apply Change to Vision Plan (future use – state)
	Change to Medical Party Rate
	Change to Dental Party Rate
	Change to Vision Party Rate
	Domestic Partnership Indicator
	Original COBRA Start Date
	COBRA Eligibility Basis

Note: The data elements on the subscriber node are specific to health enrollment transactions

Retirement/Health Schema Overview

Subscriber Info	FERP Status (state only)
	FERP Status Start Date (state only)
	FERP Status End Date (state only)
	Health Eligibility Zip Code Type
	Health Eligibility Zip Code
	Health Eligibility County
	Medical Plan Selection
	Medical Party Rate (state response)
	Dental Plan Selection
	Dental Party Rate (state response)

Note: The data elements on the subscriber node are specific to health enrollment transactions

Retirement/Health Schema Overview

Subscriber Info	Vision Plan Selection
	Vision Party Rate (state response)
	CalPERS ID
	COBRA End Date (state response only)
	Medical Eligibility Basis
	Dental Eligibility Basis
	Vision Eligibility Basis
	Change Medical Party Rate
	Change Dental Party Rate
	Change Vision Party Rate

Note: The data elements on the subscriber node are specific to health enrollment transactions

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Retirement/Health Schema Overview

Dependent Info	Relationship (Dependent Relationship)
	Date of Partnership
	Address Same as Primary
	Address Info….
	Dependent Type
	Disability Indicator
	Apply to Medical

Note: The data elements on the dependent node are specific to health enrollment transactions

Retirement/Health Schema Overview

Dependent Info	Apply to Dental
	Apply to Vision
	Disability Confirmed Indicator
	Economically Confirm Indicator
	Dependent Acquired Date
	CalPERS ID (state response only)
Person Info….	
Dependent Person Info….	
Address Info….	

Retirement/Health Schema Overview

Address Info	Address Type	
	Address Line	Address Line 1
		Address Line 2
		Address Line 3 (non-state)
	City	
	State	
	Zip Code 5	
	Zip Code 4	
	Country	
	Province	
	Postal Code	

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Retirement/Health Schema Overview

Transaction	Transaction Type / Health Event Type
	Unique Transaction ID
	Reapply Indicator
	Rescind Indicator (health only)
	Deletion Indicator (retirement only)
	Correction Indicator (retirement only)
	Rescind Reason
	Rescind Notes

Retirement/Health Schema Overview

Transaction	Transaction Effective Date (retirement only)
	Prior Transaction Effective Date (retirement only)
	New SSN
	Demographics….
	Appointment….
	Retirement Enrollment….
	Health Enrollment….
	Error….

Retirement/Health Schema Overview

Demographics	Person Info….
	Use Address For Health (health only)
	Address Info….
	Communication Info….
Appointment	Employer Info….
	Employment Info….
	Job Position Info….

Retirement/Health Schema Overview

Retirement Enrollment	Program
	Unused Sick Leave
	Unused Education Leave
	PLP Participant (state only)
	PLP Rates (state only)
	Covered by SSA
	Covered by 59 Survivor
	Optional Member Position
	Optional Member Date of Entry
	STRS Electing PERS (schools only)
	Local ARP (non-state only)
	State ARP (state only)
	State ARP Date of Entry*

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* Date derived by system, do not include

Retirement/Health Schema Overview

Health Enrollment	Health Event Reason
	Event Date
	Received Date
	Medical Group (non-state only)
	Affiliated Association
	Perm Sep Date
	Retirement Date (non-PERS subscriber only)
	Subscriber Info….
	Qualifying Person Info….
	Dependent Info….

Reporting Scenarios

Retirement

» New Appointment – School

» Appointment Change - PA

Health

» New Enrollment – School

» Add Dependent - PA

Retirement Reporting Scenarios – School NAP

	Transaction Type = NAP	
	Unique Transaction ID = #################	
	Transaction Effective Date = 2010-08-01	
Transaction	Demographics	Person Info….
		Address Info….
		Communication Info….
	Appointment	Employer Info….
		Employment Info….
		Job Position Info…
	Retirement Enrollment….	

Retirement Reporting Scenarios – School NAP

Demographics	Person Info	Person ID Type =SSN
		Person ID = ##########
		First Name = Marc
		Last Name = Jones
		Birth Date = 1955-03-22
		Gender = M

Retirement Reporting Scenarios – School NAP

Demographics	Address Info	Address Type = MAI
		Address Line = 2399 Apple Court
		City = Sacramento
		State = CA
		Zip Code 5 = 95999
		Country = US
	Communication Info	Phone Type = TDD
		US Phone = ##########
		Extension = ####
		Email = xxxxxx@xxxxxxxxxx.xx.xxx

Retirement Reporting Scenarios – School NAP

Appointment	Employer Info	Employer CalPERS ID = ##########
		Agency Code = ###
	Employment Info	Original Hire Date = 2010-08-01
		Work Calendar = 010
		CBU = R01
		Retired Annuitant = false
	Job Position Info	Member Category = MIS

Retirement Reporting Scenarios – School NAP

Retirement Enrollment	Program = CPE
	PLP Participant = false
	Covered by SSA = true
	Covered by 59 Survivor = false
	Local ARP = false

Retirement Reporting Scenarios – PA ACH

Transaction	Transaction Type = ACH	
	Unique Transaction ID = ##################	
	Transaction Effective Date = 2010-08-01	
	Demographics	Person Info….
	Appointment	Employer Info….

Retirement Reporting Scenarios – PA ACH

Demographics	Person Info	Person ID Type =PID
		Person ID = ##########
		First Name = Amy
		Last Name = Smith
Appointment	Employer Info	Employer CalPERS ID = ##########

Health Reporting Scenarios – School NEN

Transaction	Health Event Type = NEN	
	Unique Transaction ID = ##################	
	Effective Date = 2010-08-01	
	Demographics	Person Info….
		Address Info….
		Communication Info….
		Use Address for Health = true
	Appointment	Employer Info….
	Health Enrollment….	

Health Reporting Scenarios – School NEN

Demographics	Person Info	Person ID Type =PID
		Person ID = ###########
		First Name = Marc
		Last Name = Jones
		Birth Date = 1955-03-22
		Gender = M

Health Reporting Scenarios – School NEN

Demographics	Address Info	Address Type = MAI
		Address Line = 2399 Apple Court
		City = Sacramento
		State = CA
		Zip Code 5 = 95999
		Country = US
	Communication Info	Phone Type = TDD
		US Phone = ##########
		Extension = ####
		Email = xxxxxx@xxxxxxxxxx.xx.xxx

Health Reporting Scenarios – School NEN

Appointment	Employer Info	Employer CalPERS ID = ##########
	Employment Info	CBU = R01
Health Enrollment	Health Event Reason = 108	
	Event Date = 2010-08-01	
	Received Date = 2010-08-02	
	Subscriber Info	Apply Change to Medical = true
		Health Eligibility Zip Code Type = Personal
		Health Eligibility Zip Code = 95999
		Health Eligibility County = Sacramento
		Medical Plan Selection = xxx
		CalPERS ID = ##########

Health Reporting Scenarios – PA ADP

Transaction	Health Event Type = ADP	
	Unique Transaction ID = ##################	
	Effective Date = 2010-09-01	
	Demographics	Person Info….
	Appointment	Employer CalPERS ID = ##########
	Health Enrollment….	

Health Reporting Scenarios – PA ADP

		Person ID Type =PID
		Person ID = ###########
Demographics	Person Info	First Name = Adam
		Last Name = Smith
		Birth Date = 1985-11-14
		Gender = M

Health Reporting Scenarios – PA ADP

Health Enrollment	Health Event Reason = 201	
	Event Date = 2010-08-01	
	Received Date = 2010-08-15	
	Subscriber Info	Apply Change to Medical = true
		CalPERS ID = ##########
		Dependent Info….

Health Reporting Scenarios – PA ADP

Dependent Info	Dependent Person Info	Person ID = #########
		Person ID Type = SSN
		First Name = Amy
		Last Name = Smith
		Birth Date = 1988-01-23
		Gender = F
	Date of Partnership = 2010-08-01	
	Address Same as Primary Subscriber = true	
	Dependent Type = SPO	
	Dependent Relationship = SPO	
	Apply to Medical = true	

Polling Questions

Feedback

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Wrap Up

» Coming Events

  » 2010 Employer Forum

  » System Access Administrator

  » Town Halls

  » Seed Data

  » File Readiness Testing

Questions & Answers

Thank you!